Saskatchewan
Tourism and
Small Business

TRAVEL MARKETS FOR SASKATCHEWAN'S TOURISM INDUSTRY

MINNESOTA REPORT

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EXECUTIVE SUMMARY

This report describes a number of characteristics typical of the Minnesota out-of-state travel market and examines Saskatchewan's past, current and future projected performance in this market in terms of market share and market image.

Saskatchewan captures about 0.8% of the out-of-state travel by Minnesotans and Saskatchewan has the potential to increase its market share of the Minnesota market, or at least maintain its share.

This study observes that Minnesota residents are interested in a broad range of pleasure travel activities such as rural and urban sightseeing, visiting historic sites/museums, attending festivals/events, camping, hunting, fishing, hiking, wilderness canoeing and other activities. Many of these activities could be pursued in Saskatchewan.

Minnesotans tend to primarily visit Saskatchewan for purposes of outdoor recreation such as camping, fishing, hiking and wilderness canoeing. Saskatchewan's image in the Minnesota marketplace is not well-defined relative to the available outdoor recreational opportunities.

1.0 EXISTING OUT-OF-STATE TRAVEL PROFILE OF MINNESOTA RESIDENTS

1.1 Market Size

The Minnesota market generates approximately 7,375,000 out-of-state trips annually to other U.S. states, Canadian provinces, as well as other countries. Table 1 shows the distribution of these person-trips in terms of the 1981 Thorne, Stevenson & Kellogg estimates for selected destinations.

TABLE 1

Distribution of Out-of-State Trips Taken to Select Canadian Destinations by Residents of Minnesota

	1981 Person Trips[1]	Percent	Minnesota Residents Who Have Travelled to These Destinations Between 1980-83[2]
Saskatchewan	59,000	0.8	6%
Manitoba	157,000	2.1	15%
Alberta	34,000	0.5	6%
British Columbia	25,000	0.3	4%
Quebec	44,000	0.6	2%
Ontario	379,000	5.1	15%

[1]Thorne, Stevenson & Kellogg
[2]Mid-Continent Research Inc.

The comparison of these two sources reveals that Saskatchewan is the third most preferred Canadian province of destination for Minnesota travellers. For example, 15% of Minnesota person-trips to Canadian destinations in the past three years were to Manitoba and 15% to Ontario. Saskatchewan captured 6% of the Minnesota traffic to Canada in the same time period.

1.2 Market Characteristics

1.2.1 Trip Purpose

The majority of out-of-state trips taken by Minnesota residents are for pleasure travel purposes. As shown in Table 2, trips taken for pleasure purposes amount to 60% of all trips taken. Minnesota residents have a higher propensity to take pleasure trips than do residents of North Dakota or Montana. Travel for purposes of visiting friends and/or relatives is second in importance with the Minnesota market.

TABLE 2

Main Reason for Trips by Minnesota, North Dakota and Montana Residents[1], 1980-83

Trip Purpose	Minnesota	North Dakota	Montana
Pleasure	60%	49%	49%
Visiting Friends/Relatives	35%	41%	47%
Both Business and Pleasure	19%	22%	22%
Business	2%	2%	3%
Other	-	2%	1%

[1]Mid-Continent Research, Inc. study of the Minnesota market.

NOTE: Percentages may not add to 100% due to rounding or to multiple responses.

1.2.2 Activities Pursued on Pleasure Trips

Table 3 shows the relative popularity of 19 major activities often pursued by tourists of Minnesota, North Dakota and Montana on pleasure trips. Of all the pleasure activities listed, the five most popular with Minnesota travellers include rural sightseeing, historical sites/museums, urban sightseeing, festivals or special events and musical events or live theatre.

While these activities are also the five most popular with travellers from North Dakota and Montana, differences do exist among Minnesota travellers for other activities.

Minnesota travellers are more interested in festivals/special events (69%), sailing (15%), wilderness canoeing (19%), and cross-country skiing (19%).

TABLE 3

Specific Interests of Minnesota, North Dakota and Montana
Travellers on Pleasure Trips

Trip Purpose	All State[1] Average	Minnesota	North Dakota	Montana
Rural Sightseeing	79%	80%	79%	77%
Historical Sites/Museums	85%	80%	88%	88%
Urban Sightseeing	75%	75%	78%	73%
Festivals/Special Events	62%	69%	60%	56%
Musical Events/Live Theatre	56%	52%	61%	54%
Craft/Art Fairs	42%	42%	43%	40%
Camping	54%	48%	51%	64%
Water Sports	40%	38%	41%	42%
Sporting Events	47%	45%	45%	52%
Hiking	36%	41%	27%	39%
Fishing	48%	43%	46%	55%
Industrial Tours	24%	21%	30%	21%
Downhill Skiing	24%	22%	21%	29%
Sailing	12%	15%	11%	10%
Wilderness Canoeing	16%	19%	12%	16%
Cross-Country Skiing	15%	19%	9%	16%
Snowmobiling	17%	14%	17%	19%
Hunting Game Bird	21%	20%	22%	20%
Hunting Big Game	22%	17%	19%	31%

[1]Average for all three states - Minnesota, North Dakota and Montana.

Source: Mid-Continent Research, Inc.
The Vacation Habits of Travellers in Ontario, Montana, North Dakota and Minnesota.

1.2.3 Trip Frequency

The majority of Minnesota residents undertake one pleasure trip annually of four or more nights duration.

TABLE 4

Percentage Distribution of the Number of Annual Pleasure Trips of Four or More Nights Duration by Residents of Minnesota, North Dakota and Montana

Number of Pleasure Trips of 4+ Nights	All State[1] Average	Minnesota	North Dakota	Montana
0	8%	9%	8%	7%
1	41%	40%	44%	40%
2	26%	26%	27%	25%
3	10%	11%	9%	11%
4	6%	5%	6%	7%
5 or more	9%	9%	7%	10%

[1]Average for all three states.

Source: Mid-Continent Research, Inc.
The Vacation Habits of Travellers in Ontario, Montana, North Dakota and Minnesota.

1.2.4 Transportation Modes for Pleasure Travel

Minnesota travellers for long distance trips prefer using the airplane when on a pleasure trip.

TABLE 5

Modes of Transportation Used by Minnesota, North Dakota and Montana Residents on Long Distance Out-of-State Pleasure Trips

Transportation Mode	All State[1] Average	Minnesota	North Dakota	Montana
Automobile	51%	43%	53%	57%
Airplane	43%	54%	37%	37%
Train	2%	-	3%	4%
Bus	4%	3%	4%	5%
Van/RV/Camper	4%	4%	4%	5%
Other	2%	2%	2%	3%

[1]Average for all three states

Source: Mid-Continent Research Inc.
The Vacation Habits of Travellers in Ontario, Montana, North Dakota and Minnesota.

NOTE: Percentages may not add up to 100% due to more than one mode of transportation used.

1.2.5 Accommodation Used on Pleasure Trips

Table 6 displays the type of accommodation used by Minnesota travellers when on pleasure trips. Hotels and motels are the dominant type of accommodation (47%) used by Minnesota travellers.

Minnesota travellers are typically more likely to stay in hotels and motels than stay with friends and relatives as compared to North Dakota or Montana travellers.

TABLE 6

Accommodation Used by Minnesota, North Dakota and Montana Travellers on Pleasure Trips

Type of Accommodation	All State[1] Average	Minnesota	North Dakota	Montana
Hotels/Motels	43%	47%	42%	40%
Friends/Relatives	45%	38%	48%	50%
Camping	10%	11%	10%	10%
Resorts	3%	4%	4%	2%
Other	6%	9%	4%	4%

[1]Average for all three states.

Source: Mid-Continent Research, Inc.
The Vacation Habits of Travellers in Ontario, Montana, North Dakota and Minnesota.

NOTE: Percentages may not add up to 100% due to more than one type of accommodation being used on a pleasure trip.

Staying with friends and relatives is the most significant difference in the type of accommodation used by Minnesota travellers as opposed to North Dakota and Montana pleasure travellers. Only 38% of Minnesota travellers stay with friends and relatives as compared to the three-state average of 45%.

1.2.6 Trip Planning Behaviour by Minnesota Residents

The main months in which Minnesota residents start planning their summer pleasure trips are January, April and May. However, June is the primary month in which Minnesota travellers decide on their destination. Table 7 further illustrates when summer trips are planned and when a decision on destination is made.

It is interesting to note that 39% of Minnesota travellers do not plan on taking a summer pleasure trip.

TABLE 7

Summer Trip Planning and Trip Destination Decision by Minnesota Residents

Month	Month When Summer Trip is Planned	Month	Month When Destination is Decided for Summer Trip
January	9%	January	4%
February	5%	February	2%
March	6%	March	3%
April	11%	April	6%
May	8%	May	11%
June	7%	June	16%
July	1%	July	6%
August	-	August	2%
September	1%	September	-
October	1%	October	-
November	-	November	-
December	2%	December	1%
Don't Know	9%	Don't Know	11%
Do Not Take Summer Pleasure Trip	39%	Do Not Take Summer Pleasure Trip	39%

The pattern of who makes decisions about a vacation destination in Minnesota are somewhat different to the patterns found in North Dakota and Montana. The husband and wife jointly decide in 36% of the households, the whole family deciding in about 17% of the households, the male head deciding in 12%, and the female head in 5% of the households. The major difference between Minnesota and North Dakota and Montana is that joint husband/wife or mother/father play a less important role in the vacation decision process in Minnesota than in Montana or North Dakota.

Table 8 shows that Minnesota residents have a greater tendency to use travel agents to plan vacations relative to Montana or North Dakota.

For those who use travel agents, convenience and cheaper travel were the primary reasons for using travel agents.

TABLE 8

Use of Travel Agents and Packaged Tours
by Minnesota Travellers

Use of Travel Agents in Past 3 Years to Plan/Arrange Pleasure Trips

Yes = 46% No = 54%

Reasons Why:

Convenience	19%
Information/Guidance	4%
Cheap Trip	8%
Know Agent	4%
Air Ticket and Hotel Reservation	5%
Other/Not Sure	12%
Did Not Use Travel Agent	54%

Use of Package Tours in Past 3 Years

Yes = 18% No/No Answer = 82%

Reasons Why:

More Economical	6%
Convenience	4%
Pre-Arranged	4%
Group Tour	3%
Other/Not Sure	3%
Did Not Use Package	82%

NOTE: Percentages may not add up to 100% since more than one reason may have been given by respondent.

2.0 PERFORMANCE OF THE SASKATCHEWAN TOURISM INDUSTRY IN THE MINNESOTA MARKETPLACE

2.1 Saskatchewan's Market Share of Minnesota Out-of-State Travellers

According to the Thorne, Stevenson and Kellogg estimate, Minnesota residents undertook 7,375,000 out-of-state person-trips to other destinations. Saskatchewan captured 59,000 person-trips or 0.8% market share.

2.2 Primary Travel Motivators in the Minnesota Market

According to the Minnesota Vacation Travel Surveys, the main purposes of trips for Minnesota travellers are outdoor recreation (30%) and sightseeing (28%). The majority of these trips are not weekend trips (61%) and the greatest proportion of total international trips from Minnesota are vacation trips (67%). Most of these trips range from 4-9 nights (37%), while some are taken for only two or three nights (29%). The trip motivators are outlined in Table 9.

TABLE 9

Selected Main Travel Motivators/Activities
of Minnesota Travellers

Main Motivators/Activities	Ontario Travellers
Outdoor Recreation	30%
Urban/Rural Sightseeing	28%
Visiting Friends/Relatives & Entertainment	10%

Source: Minnesota Vacation Travel Surveys, Manitoba, 1982

2.3 Motivators for Pleasure Trips to Saskatchewan by Minnesota Residents

Table 10 shows the activities which comprised the main travel purposes of Minnesota residents travelling to Saskatchewan on their most recent pleasure trip. The main activities which are pursued in Saskatchewan by Minnesota residents include primarily urban and rural sightseeing, fishing, camping, and hiking.

Saskatchewan tends to attract the outdoor-oriented pleasure traveller from Minnesota. Table 11 further illustrates what activities Minnesota residents look for on a pleasure trip relative to the activities they undertake in Saskatchewan. As Table 11 shows, although Minnesota travellers rank rural sightseeing, visiting historic sites, attending festivals/events, etc., high on their preferred activities, while in Saskatchewan their participation is low or non-existent in the activities they enjoy doing.

TABLE 10

Main Purpose or Activity Pursued on Last Pleasure Trip to Saskatchewan

Purpose	All State[1] Average	Minnesota	North Dakota	Montana
Rural Sightseeing	41%	34%	39%	50%
Historical Sites	2%	-	-	6%
Urban Sightseeing	25%	27%	25%	22%
Festivals	6%	-	11%	6%
Camping	14%	20%	11%	11%
Water Sports	2%	-	-	6%
Sporting Events	4%	-	-	11%
Musical Events	1%	-	4%	-
Fishing	17%	19%	25%	6%
Hiking	5%	15%	-	-
Craft/Art Fairs	2%	-	-	6%
Downhill Skiing	-	-	-	-
Industrial Tours	-	-	-	-
Cross-Country Skiing	-	-	-	-
Sailing	-	-	-	-
Snowmobiling	-	-	-	-
Wilderness Canoeing	3%	8%	-	-
Big Game Hunting	4%	6%	-	6%
Game Bird Hunting	2%	6%	-	-

[1]Average for all three states.

Source: Mid-Continent Research Inc.
The Vacation Habits of Travellers in Ontario, Montana, North Dakota and Minnesota.

NOTE: Percentages do not add up to 100% due to multiple responses.

TABLE 11

Comparison of Activities Sought on a Pleasure Trip by
Minnesota Residents and Their Activity Participation in Saskatchewan

Activities Sought by Minnesota Residents on a Pleasure Trip		Minnesota Visitors Who Participate in Saskatchewan in These Activities
Rural Sightseeing	80%	34%
Historical Sites/Museums	80%	-
Urban Sightseeing	75%	27%
Festivals/Events	69%	-
Musical Events	52%	-
Craft and Art Fairs	42%	-
Camping	48%	20%
Water Sports	38%	-
Sporting Events	45%	-
Hiking	41%	15%
Fishing	43%	19%
Industrial Tours	21%	-
Downhill Skiing	22%	-
Sailing	15%	-
Wilderness Canoeing	19%	8%
Cross-Country Skiing	19%	-
Snowmobiling	14%	-
Game Bird Hunting	20%	6%
Big Game Hunting	17%	6%

2.4 Length of Stay by Minnesota Visitors to Saskatchewan

Table 4 shows that 41% of Minnesota pleasure travellers normally take at least one pleasure trip lasting four or more nights away from home. Table 12 shows that of all Minnesota travellers taking overnight trips to Saskatchewan, 45% stayed at least four nights on their last pleasure trip to Saskatchewan.

TABLE 12

Percent of Overnight Trips Taken by Minnesota Travellers Lasting at Least Four or More Nights Away from Home

Length of Trip	To Saskatchewan
Three Nights or Less	55%
Four or More Nights	45%

Fifty-five percent (55%) of Minnesota residents on their last pleasure trip to Saskatchewan, tended to spend three nights or less in the province.

2.5 Type of Accommodation Used by Minnesota Residents on Trips to Saskatchewan

In general, Minnesota tourists tend to stay more often in hotel/motel accommodation when travelling in Canada. This is primarily due to the fact that Minnesota pleasure travellers tend not to use homes of friends or relatives on Canadian pleasure trips to any great extent.

TABLE 13

Type of Accommodation Used by Minnesota Travellers in Canada and in Saskatchewan

Accommodation	Canadian Destination	Saskatchewan
Hotels/Motels	51%	27%
Friends/Relatives	8%	13%
Camping	24%	48%
Resorts	13%	6%
Bed-Breakfast	-	-
Other	2%	-
Passed-Through	4%	6%

In the case of travel to Saskatchewan, Minnesota residents tend to stay more in campgrounds. This is due to the fact that one of the main motivators for travel for Minnesotans is outdoor recreation and canoeing, an activity which 48% of Minnesotans seek on a pleasure trip.

2.6 Mode of Travel Used by Minnesota Residents When Travelling to Saskatchewan

Table 5 noted that Minnesota residents display a greater tendency to use airlines when travelling to Canadian destinations as compared to North Dakota and Montana residents.

Trips taken to Saskatchewan by Minnesota residents, however, are still very strongly-oriented to the use of the private automobile as the primary transportation mode followed by the use of vans/R.V.'s/campers. Table 14 compares mode of transport used by Minnesota pleasure travellers to all Canadian destinations and to Saskatchewan.

TABLE 14

Modes of Transport Used by Minnesota Pleasure Travellers on Out-of-State Trips in Canada and to Saskatchewan

Transport Mode	Trips in Canada	Trips to Saskatchewan
Automobile	75%	66%
Airplane	11%	14%
Train	1%	-
Bus	6%	-
Van/RV/Camper	4%	27%
Other	1%	-

2.7 Party Size Characteristics of Minnesota Residents Travelling to Saskatchewan

According to the Minnesota Vacation Travel Surveys, the most common travel party comprises one or two people (72%) for pleasure trips. According to the 1983 Mid-Continent study of the Minnesota market, the average party size to Saskatchewan was 4.1. This relatively high party size of Minnesota travellers to Saskatchewan is due to family travel for outdoor recreation which is reflected by the high use of campgrounds in the province as well as vans/R.V.'s/campers being the second most popular type of transportation used by Minnesotans who visit Saskatchewan.

TABLE 15

Party Size of Minnesota Pleasure Travellers to Saskatchewan

Party Size	Percent
1	-
2	25
3	20
4	6
5	14
6 or more	34
Average	**4.1**

TABLE 16

Comparison of Party Size for Minnesota, North Dakota and Montana

State	Average Party Size
Minnesota	4.1
North Dakota	3.9
Montana	3.7

2.8 Travel Market Image of Saskatchewan as Held by Minnesota Residents

Approximately 34% of Minnesota residents gave Saskatchewan a positive rating.

The main difference between the Minnesota market and the Western Canada and Ontario market is that 5% of Minnesota residents gave Saskatchewan a negative image as compared to a 44% negative rating by the three western provinces, excluding Saskatchewan, and a 23% negative rating by Minnesota.

The second main difference between the Minnesota market and the Western Canadian and Ontario market is that 45% of Minnesota residents stated "don't know anything about it/have no idea what it's like."

Minnesota residents tend to view Saskatchewan positively in terms of scenery and hunting and fishing opportunities. The most negative perception held about Saskatchewan was that it is very flat and uninteresting with no pretty scenery.

When asked to describe Saskatchewan as a place for pleasure or business travel, 45% of Minnesota residents gave it a favourable rating, 5% an unfavourable rating, while 50% "did not know" or "did not know anything about Saskatchewan".

Table 17 and Table 18 provide a detailed breakdown of Minnesota residents image or perception of Saskatchewan.

TABLE 17

Perceptions Held of Saskatchewan by Minnesota Residents - If Asked by a Friend

Favourable Mentions	34%
° Just wilderness I suppose/Full of prairies and open space/ Prairies and flat country like Montana/North Dakota	1%
° Nice place to go/Great place to spend a week/Been there and would recommend going there/You should visit there, check it out/A nice place to visit	4%
° I heard it's beautiful/I think it is real pretty in the summer/It has a lot of scenery/Very scenic/It is a very pretty place/The scenery is beautiful	10%
° There's farming there/Good farm land/Agricultural area/It's grain country/Grow a lot of wheat	1%
° I'd love to go there/I'd like to go there/I would like to see it	8%
° Good fishing/Good hunting/Good fishing and hunting	8%
° Friendly people/The people are hospitable/Friendly/Nice people	3%
° Have relatives there/Was born there/Own property there/ Have friends there	1%
° Regina is a very interesting place to visit/Regina is worth a visit/I liked Regina/Regina is a nice city	-
° Mentioned a specific thing to see/Place to see/Thing to do	2%
° Lots of things to do there/Lots to see/Lots of shops	-
° Good lakes/Nice lakes/Lot of lakes/Big lakes/Cold clear lakes	-
° Other favourable mentions	4%
Unfavourable Mentions	5%
° It's not really very scenic/Very flat and uninteresting/No pretty scenery	3%
° Very cold in the winter/It's cold/Don't like the cold weather	1%
° Other unfavourable mentions	2%
° I have never been there	10%
° Don't know anything about it/Have no idea what it's like	45%
° Never heard of Saskatchewan	1%

TABLE 18

Perceptions of Saskatchewan as a Place for Pleasure or Business Travel by Minnesota Residents

Favourable Mentions	45%
° I understand that Saskatchewan is a beautiful place to travel - lots of scenery/The scenery is very pretty/Very nice countryside/The pretty scenery/Beautiful like the rest of Canada	14%
° Fine for pleasure/It would be a pleasure to go there/I'd like to go there/For pleasure, it's great/Good place to get away from it all/ Definitely a relaxing place to go	9%
° Nice place/Hear it's a nice place to go/Friends and relatives like it/ Sounds like a nice place	6%
° For the sportsman it is great/It's probably good duck hunting/It's good hunting territory/Probably outdoorsy/Good fishing and hunting	11%
° Should be suitable for business/Very good place for business	1%
° Plenty of things to see/Good for sightseeing/Interesting place to visit/ Interesting to go there	3%
° Nice people there/People are friendly/Hospitable	2%
° Farm country/Lots of wheat fields/It's got a lot of farm land	1%
° Seen advertisements/On TV looks like a nice place to visit/Recall some advertisements for there	4%
° Clean/Clean - no litter/Clean and tidy countryside	1%
° Lakes/Nice lakes/Have lots of lakes	-
° I think of the wilderness/It is fairly wilderness yet - we like the wilderness and camping	2%
° Other favourable mentions	3%
° It's okay/All right/It's average/Can't be too bad/Sounds okay	1%
Unfavourable Mentions	5%
° No attraction for me to go there - not too much to do/Not my kind of place/Nothing there I like to do or see	-
° I wouldn't go there/Not interested/Not a place I would want to be (no reason given)	2%
° Flat/Just prairies	1%
° Don't like the scenery/Not pretty scenery there	-

TABLE 18 (cont'd)

Unfavourable Mentions

° Prefer somewhere else/like Manitoba better/ It's not number one on my list	1%
° Other unfavourable mentions	2%
° Don't know/Don't know anything about it	50%

When those Minnesota residents who had travelled on a pleasure trip to Saskatchewan were asked to describe what they liked best about the province, "scenery" and "nice/friendly people" were the most often mentioned as is outlined in Table 19. When they were asked what they liked the least about their pleasure trip to Saskatchewan, "weather" and "flat countryside" were most frequently mentioned factors as noted in Table 20.

TABLE 19

Positive Impressions of Saskatchewan Held by Minnesota Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Best	Percent
Liked Everything	33
The Scenery	40
Nice/Friendly People	13
Specific Place or Event	-
Visiting Friends/Relatives	6
Good Fishing	13
Clean Cities	-
Relaxed Atmosphere/Easy Going Place	14
Good Hunting	13

TABLE 20

Negative Impressions of Saskatchewan Held by Minnesota Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Least	Percent
Nothing Liked	6
Flat Countryside	28
Rainy/Windy/Cold Weather	-
High Costs	-
Too Many Bugs/Mosquitos	13
Too Far Away	13

Saskatchewan's market image in Minnesota can be summarized as follows:

- A high level of lack of awareness (50%) of Saskatchewan in general and more specifically what Saskatchewan offers in terms of tourism attractions and services for pleasure or business travel.

- As a destination for pleasure or business travel, 45% of Minnesota residents gave Saskatchewan a favourable rating comparing with a 56% favourable rating by North Dakota residents and Montana's 50% favourable rating.

- Those Minnesota residents who visited Saskatchewan rate the province highly on its scenery, relaxed atmosphere and good hunting and fishing. Of the aspects least liked, these Minnesota residents were most likely to dislike the flat countryside and travelling distance.

- The most significant barrier which Saskatchewan has to overcome in the Minnesota marketplace is the lack of awareness of Saskatchewan's travel/ tourism opportunities, attractions and services.

3.0 POTENTIAL MARKET FOR TRAVEL TO SASKATCHEWAN

The previous two chapters of this report described a number of characteristics typical of the Minnesota out-of-state travel market and examined Saskatchewan's past level of performance in this market in terms of market share and market image.

It was noted, for example, that Saskatchewan, in 1981, captured 0.8% (59,000 person-trips) of the out-of-state travel by Minnesota residents. Although Saskatchewan's marketing/promotional efforts in the Minnesota marketplace have been minimal, Saskatchewan is the third most popular Canadian province with the Minnesota travellers. The main obstacles to penetrating the Minnesota market is the distance to market factor and the lack of awareness of Saskatchewan.

Minnesota residents are interested in a variety of pleasure travel activities such as rural sightseeing, urban sightseeing, visiting historical sites/museums, attending festivals and events, fishing, and camping and hunting. Saskatchewan cannot compete in the Minnesota market for urban sightseeing or for visiting historical sites/museums since larger urban centres and more developed historical sites exist in closer proximity to the Minnesota market, such as in Manitoba. Saskatchewan can offer the outdoor experience in the Minnesota market. Saskatchewan can capitalize on the Minnesota outdoor recreation segment of the state's travel market which constitutes 30% of the total travel market. Saskatchewan can promote camping, fishing, hunting, boating, canoeing, and hiking in an asthetic scenic environment.

3.1 Long-Term Outlook for Growth in Minnesota's Out-of-State Travel Markets

In an attempt to measure the travel propensity of Minnesota residents, Thorne, Stevenson & Kellogg, for preparation of the Saskatchewan Tourism Strategy, have plotted per capita disposable income against trips per capita. Table 21 shows population and income projections as well as projected increases (decreases) in trips per capita. Using these projections they have calculated total person-trips for Minnesota residents to 1987 and plotted these on the graph which appears in Figure 1.

Their forecasts show total 1987 person-trips ranging between 22.5 and 24.4 million - between a decrease of 1% from 1982 levels, and an increase of 7%. The important point to note here is that under their low-case economic assumptions, population increases in Minnesota to 1987 will be insufficient to counter the negative effects of decreasing disposable income on travel propensity and thus, total market size. If this forecast were realized, destinations for the Minnesota market would have to compete strongly even just to maintain their current share of a diminishing market.

Over the longer-term, some increases are expected in the Minnesota tourist market as westward migration in the U.S. continues, but this effect will be small in comparison with states such as Washington and California.

Centres for high technology in Minneapolis and St. Paul will provide added economic stimulus to what would otherwise be a low potential economy after short-term revival has been accomplished. The combination of westward migration and the outlook for a somewhat better than average economy should mean that Minnesota remains at least as important a market in 2000 as it is now.

3.2 Forecast of Potential Travel Market for Saskatchewan from Minnesota to 1987

If Saskatchewan maintained its historical market share of about .08% of Minnesota's out-of-state travel markets, Saskatchewan could expect travel by Minnesotans to Saskatchewan to grow from the 59,000 person-trips in 1981 up to 63,000 person-trips in 1987, using the high scenario and to decrease to 58,400 person-trips by 1987, using the low scenario.

NOTE: High scenario represents a 7% growth rate.
Low scenario represents a 1% decrease.

FIGURE 1

Minnesota Person-Trips

TABLE 21

Minnesota Forecasts - Travel Propensity
and Personal Disposal Income

Year	Population[1]	Personal Disposable Income[2]		Person Trips Per Capita[3]	
		Low Forecast	High Forecast	Low Forecast	High Forecast
1975	3,937	3,084	3,084	5.36	5.36
1976	3,970	3,121	3,121	5.40	5.40
1977	3,996	3,326	3,326	5.63	5.63
1978	4,024	3,419	3,419	5.81	5.81
1979	4,060	3,398	3,398	5.72	5.72
1980	4,076	3,273	3,273	5.62	5.62
1981	4,113	3,269	3,269	5.62	5.62
1982	4,133	3,182	3,182	5.50	5.50
1983	4,148	3,182	3,326	5.50	5.61
1984	4,164	3,145	3,341	5.44	5.70
1985	4,179	3,108	3,355	5.40	5.72
1986	4,210	3,071	3,370	5.35	5.74
1987	4,242	3,034	3,385	5.30	5.76

[1]U.S. Department of Commerce Bureau of Census (1975 - 1982 and 1985, 1990). Thorne, Stevenson & Kellogg estimates for remaining years.

[2]U.S. Department of Commerce Bureau of Census (1975 - 1982). Thorne Stevenson & Kellogg estimates for remaining years.

[3]With adjustment for changes in survey methodology = +2 person-trips per capita.

The Minnesota survey conducted by Mid-Continent Research, Inc. in 1983 found that 28% of Minnesotans were either "very" or "somewhat" likely to travel to Saskatchewan on a pleasure trip in the next year or two. This level of interest in travel to Saskatchewan was lower than the likelihood expressed by North Dakota travellers, but higher than the likelihood expressed by Montana pleasure travellers.

TABLE 22

Percent of Minnesota, North Dakota and Montana Travellers Indicating Likelihood of Visit to Saskatchewan in the Next Year or Two

Level of Likelihood	Minnesota	North Dakota	Montana
Very Likely	9%	15%	8%
Somewhat Likely	19%	15%	17%
Total % Disposed to Travel to Saskatchewan	28%	30%	25%

3.3 Reasons for Likelihood of Minnesota Residents to Visit Saskatchewan

The 1983 market study conducted by Mid-Continent Research Inc., also examined the "reasons" that Minnesota residents stated they were either likely or not likely to visit Saskatchewan. The reasons given for probable travel to Saskatchewan by Minnesotans were, in order of importance, some place different to go, hunting or fishing, camping/touring and "passing through" Saskatchewan to another destination.

TABLE 23

Reasons Minnesota Residents are Likely to Travel
to Saskatchewan in the Next Year or Two
(All Mentions)

Reasons	Percent
Explore New Place/See the Scenery	11
Visit Friends/Relatives	1
"Passing Through"	3
Camping/Touring	3
Go Every Year	1
Great Fishing/Hunting	8
Other	4
Total	**31**

Minnesota residents who reported being unlikely to visit Saskatchewan felt this way for the following reasons: nothing to do there/rather go someplace else first; lack of knowledge about Saskatchewan; no interest in visiting Saskatchewan; no friends or relatives to visit there; and lack of money.

TABLE 24

Reasons Minnesota Residents are Not Likely to Travel
to Saskatchewan in the Next Year or Two
(Total Mentions)

Reasons	Percent
Rather Go Somewhere Else/Nothing to do There	28
No Interest	9
No Relatives/Friends	4
Money Problems	6
Lack of Knowledge About Saskatchewan	11
No Time/Too Busy	3
Too Old/Health Reasons	4
Too Far Away	2
Other	4
Total	**71**

In terms of those who reported that they were "not too likely" to visit Saskatchewan, 11% stated that it was due to lack of knowledge. However, reasons such as, "nothing to do/rather go somewhere else" and "no interest in going there" are probably in all likelihood also attributable to a lack of knowledge about Saskatchewan's tourism attributes and to no significant marketing/promotional efforts in the Minnesota marketplace.

3.4 Factors Most Likely to Influence Travel by Minnesotans to Saskatchewan

Table 25 shows the factors which would motivate Minnesota residents to travel to Saskatchewan in the next year or two. The main motivators would be the availability of extra money; a good hunting and/or fishing experience; and if friends/relatives were going. However, 9% mentioned they would be influenced by brochures or other forms of advertising/promotion, and 8% by more specific information about activities/sightseeing opportunities.

TABLE 25

Factors Most Likely to Influence Travel to Saskatchewan by Minnesotans in Next Year or Two (Total Mentions)

Factor	Percent
If I Had Friends/Relatives to Visit	4
If Friends/Relatives Were Going	9
A Good Fishing or Hunting Experience	10
Good Priced Package Tour	4
More Specific Information	8
Special Event/Activity	3
Curiosity/Just to Go There	2
Brochure/Advertising/Promotion	9
Someone's Recommendation	1
Extra Cash	13
If Remarkable Scenery was Available	3
Nothing	16
Other	14
Don't Know	15
Total	**111**

3.5 Potential Size of Markets for Specific Activities

Table 26 provides a breakdown of the potential size of the market in Minnesota for specific Saskatchewan activities. Table 26 shows that the promotion of a package of specific activities/attractions can be associated with influencing a greater influx of Minnesota visitors to Saskatchewan. Specific activities/attractions such as camping, fishing, wilderness canoeing, hunting, and rural sightseeing, should be packaged for the Minnesota market and promoted to the strong outdoor recreational interest which exists in that state.

TABLE 26

Existing and Projected Growth to 1987 in the Minnesota Market
For Selected Pleasure Travel Activities in Saskatchewan

Travel Activity	Minnesota Residents Interested in Activity	Size of Market in 1983 Person-Trips[1]	Existing Market Captured	Projected Maximum Market Available by 1987 for Sask.[2]	Increase
Rural Sightseeing	80%	20,000	34%	21,500	1,500
Historical Sites	80%	-	-	-	-
Urban Sightseeing	75%	16,000	27%	17,000	1,000
Festivals/Events	69%	-	-	-	-
Camping	48%	12,000	20%	12,800	800
Water Sports	38%	-	-	-	-
Sporting Events	45%	-	-	-	-
Musical Events	52%	-	-	-	-
Fishing	43%	11,000	19%	11,800	800
Hiking	41%	9,000	15%	9,600	600
Craft/Art Fairs	42%	-	-	-	-
Downhill Skiing	22%	-	-	-	-
Industrial Tours	21%	-	-	-	-
Cross-Country Skiing	19%	-	-	-	-
Sailing	15%	-	-	-	-
Snowmobiling	14%	-	-	-	-
Wilderness Canoeing	19%	4,750	8%	5,050	300
Big Game Hunting	17%	3,500	6%	3,750	250
Game Bird Hunting	20%	3,500	6%	3,750	250

[1]Based on 59,000 person-trips.
[2]Based on high scenario of 7% growth rate by 1987.

3.6 Characteristics of Minnesota Visitors to Saskatchewan

According to the U.S. National Travel Survey, the great majority of Minnesota residents who travel outside the U.S. are in the $10 - $20 thousand income bracket (42%) or the $25 - $50 thousand income bracket (20%). Professional and managerial occupations of the family head predominate (40%). The largest portion of international travellers are between the ages of 35 and 44 (21%), with other age groups represented in the following order: under 18 years old (17%); 25 - 34 years old (16%); 45 - 55 years old (16%); and 55 - 64 years old (16%). More than half (58%) of the international travellers from Minnesota are male, and the great majority (68%) are married. The major Minnesota market for Saskatchewan is a family market, the largest part of which is in the lower-middle income bracket, and an important part of which is in the middle income bracket.

In 1981, 79% of Minnesota travellers to Canada were less than 50 years old. But 64% of Minnesota households headed by persons aged 50 and older, took a trip.

According to the Minnesota Vacation Travel Surveys, the main purposes of trips for Minnesota travellers are outdoor recreation (30%) and sightseeing (28%) with VFR and entertainment accounting for a much smaller proportion (about 10% each). The majority of these trips are not weekend trips (61%) and the greatest proportion of total international trips from Minnesota are vacation trips (67%). Most of these trips range from 4-9 nights (37%), while some are taken for only two or three nights (29%). The most common travel party comprises one or two persons (72%).

1977 current U.S. dollars.

4.0 CONSIDERATIONS AND IMPLICATIONS FOR MARKETING AND PROMOTIONAL STRATEGIES

Previous chapters of this report have noted a number of important aspects of the Minnesota travel market for Saskatchewan. The main activities are rural and urban sightseeing, camping and fishing which Minnesotans pursue in Saskatchewan.

4.1 Improvements Required to Saskatchewan's Market Image in Minnesota

Minnesotans generally see Saskatchewan as a place for sightseeing, camping, fishing and hunting.

At the same time, 50% of Minnesota residents have "no image" of Saskatchewan.

There is a need to create an image of Saskatchewan as a desirable place to vacation in on the basis of Saskatchewan's tourism resources and attractions. This will require the diversity of Saskatchewan's natural resources for outdoor recreation purposes such as sightseeing, camping, fishing and hunting.

4.2 Existing Awareness of Specific Attractions

Table 27 shows the awareness of selected Saskatchewan attractions in the Minnesota market.

TABLE 27

Awareness of Saskatchewan Places, Attractions and Events by Minnesotans

Place/Attraction/Event	Level of Awareness
Regina	55%
Saskatoon	60%
Moose Jaw	45%
Regina Royal Canadian Mounted Police Training Depot and Museum	32%
Pioneer Days, Saskatoon	34%
Churchill River	25%
Prince Albert National Park/ Waskesiu	29%
Moose Mountain Provincial Park/ Kenosee	12%
Grasslands	16%
Regina Buffalo Days Exhibition	20%
Cypress Hills Provincial Park	18%
Lake Diefenbaker	9%
Lac La Ronge Provincial Park	11%
Qu'Appelle Valley	8%
Fort Walsh National Historic Park	9%
Batoche	3%
None of These - Not Heard of Any	11%

The cities enjoy the highest level of awareness in Minnesota, although this does not mean Minnesota residents will travel specifically to Saskatchewan to see Regina, Saskatoon or Moose Jaw.

It is interesting to note that natural features such as the Qu'Appelle Valley have a low level of awareness.

This would suggest that Saskatchewan's marketing/promotional activities focus first on creating a favourable or positive image of Saskatchewan as a desirable vacation place for outdoor recreation with a wide-range of topography and "things to do and see". The second marketing/promotional thrust should be on specific activities:

- rural sightseeing
- fishing
- camping
- wilderness canoeing

- special major events
- specific attractions in Regina and Saskatoon
- hunting

4.3 Promotional Media for Encouraging Travel to Saskatchewan by Minnesota Residents

Table 28 shows the sources of ideas about places to go for pleasure travel as reported by Minnesotans in the 1983 study. As expected, word-of-mouth references from friends or relatives is the most dominant factor in terms of where people got their ideas for pleasure travel. Newspapers and magazines followed in second and third order of importance.

TABLE 28

Source of Ideas About Places to Go

Source	Percent
Friends/Relatives	66
Newspapers	27
Magazines	24
Travel Agency/Travel Brochures	3
Television	16
Decide Myself/Our Own Ideas/What We Want to do/Where We Want to go	5
In the Mail	12
Radio	8
Chamber of Commerce/Travel Show/ Information Booth/Tours Through	6
Books/The Library/Encyclopedias	2
Automobile Club	3
Visit Relatives/Visit Family	1

Tables 29, 30 and 31 illustrate the type of media Minnesota residents read or listen to.

TABLE 29

Daily Newspaper Minnesotans Read on a Regular Basis

Newspaper	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000 Over	Men	Women
Minneapolis Star and Tribune	47	30%	57%	53%	29%	67%	28%	43%	64%	69%	48%	46%
St. Paul Pioneer Press	9	4%	9%	-	26%	17%	8%	11%	12%	7%	7%	10%
St. Paul Dispatch	8	4%	3%	4%	30%	21%	7%	5%	6%	7%	8%	7%
Duluth News and Tribune	7	5%	7%	24%	11%	-	12%	6%	-	6%	9%	6%
Rochester Post Bulletin	5	7%	-	27%	4%	-	4%	5%	7%	6%	4%	5%
Mankato Free Press	3	6%	4%	-	-	-	5%	3%	5%	2%	4%	3%
St. Cloud Daily Times	3	7%	3%	-	-	-	5%	3%	2%	2%	4%	3%
U.S.A. Today	2	1%	2%	4%	4%	4%	1%	5%	-	5%	4%	1%
Duluth Herald	2	2%	2%	4%	4%	-	4%	2%	2%	2%	3%	2%
Wall Street Journal	2	1%	2%	-	-	8%	2%	-	-	2%	3%	1%
Other Mentions	20	31%	19%	8%	9%	8%	19%	23%	12%	13%	20%	20%
None - Don't Read a Daily Paper	14	22%	10%	4%	13%	12%	21%	14%	13%	9%	13%	14%

TABLE 30

Magazines Read Regularly by Minnesota Residents

Magazine	Percent
Sports Illustrated	24
Readers Digest	21
Time	20
Maclean's	-
Chatelaine	-
National Geographic	8
Newsweek	12
Women's Magazines	5
Regional Magazines	6
Good Housekeeping	8
Home and Garden Magazines	3
Sports Magazines	8
McCall's	9
Better Homes and Gardens	9
General Interest Magazines	3
Ladies Home Journal	7
Business and Finance Magazines	4
People	4
Science Magazines	5
U.S. News & World Report	4
Trade, Technical and Professional Journals	2
Cosmopolitan	3
Family Circle	4
Redbook	3
Woman's Day	2
Outdoor Life	2
Life	3
Farming and Farm Life Magazines	2
Sports Afield	3
Field and Stream	3
Popular Mechanics	3
Farm Journal	2
The Farmer	3
Money	2
Other Magazines	23
None - Don't Read Any Magazines	16

TABLE 31

Radio Stations Listened to Most Often by Minnesota Residents

Radio Station	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000 Over	Men	Women
WCCO - AM	19	25%	14%	8%	13%	33%	21%	26%	21%	9%	18%	19%
WDGY - AM	3	6%	1%	-	4%	-	3%	3%	2%	5%	3%	2%
KSTP - AM	2	-	3%	5%	9%	-	3%	-	6%	5%	1%	3%
WWTC - AM	2	-	1%	-	-	12%	-	2%	-	-	2%	1%
KOAL - AM	1	2%	-	8%	-	-	4%	-	-	-	-	2%
KROC - AM	1	2%	-	4%	-	-	-	-	2%	-	-	2%
WKKG - AM	1	3%	-	-	-	-	2%	-	2%	-	-	2%
Other AM Stations	14	22%	14%	4%	12%	4%	22%	11%	5%	6%	9%	17%
WCCO - AM & FM	2	-	2%	-	4%	4%	1%	-	-	2%	1%	2%
Public Radio	2	-	3%	-	9%	-	-	2%	3%	7%	2%	2%
KS95 - FM	10	6%	14%	14%	9%	4%	1%	15%	17%	17%	11%	10%
WLOL - FM	4	1%	5%	4%	13%	4%	1%	5%	6%	9%	3%	5%
WCCO - FM	4	-	7%	9%	-	8%	3%	5%	5%	7%	2%	6%
KQRS - FM	3	1%	6%	5%	-	-	5%	-	-	5%	6%	2%
KSJN - FM	2	1%	2%	-	4%	4%	1%	2%	2%	5%	1%	2%
KTWN - FM	2	-	2%	-	-	8%	3%	-	3%	-	2%	1%
KEEZ - FM	1	2%	1%	-	-	-	1%	3%	-	-	2%	1%
Other FM Stations	19	23%	16%	33%	11%	12%	11%	27%	22%	14%	26%	15%
Don't Know/It Varies	3	2%	3%	-	12%	-	10%	-	-	2%	4%	3%
None - Don't Listen	4	2%	6%	8%	-	4%	7%	-	2%	7%	4%	4%
Total	**100**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

4.4 Timing and Promotional Activities

Section 1.2.6 of Chapter 1 of this report, gave details of the summer trip planning characteristics of Minnesotans. It was noted that April and January are important months for planning summer pleasure trips.

5.0 CONCLUSIONS

The following conclusions can be drawn about the Minnesota market for Saskatchewan based on the data and analysis contained in this report.

5.1 Saskatchewan captures a very small portion of Minnesota's out-of-state travel with the Minnesota market more heavily-oriented to Saskatchewan for pleasure related reasons. Orientations of the Minnesota market to Saskatchewan are for rural/urban sightseeing, camping, hunting and fishing. Even for these activities, Saskatchewan is not generating the traffic volume from the Minnesota market which Saskatchewan would appear to have the potential to generate.

5.2 Although the Minnesota market did not grow significantly in the past few years, it is now increasing and is expected to grow 7% under the high scenario and a decline of 1% under the low scenario over the 1982 level.

5.3 The Minnesota market is outdoor recreation oriented. To significantly penetrate the Minnesota market, Saskatchewan will have to upgrade its outdoor recreation plan and, as well as upgrade the quality of tourism services, especially in the rural areas of the province and in Northern Saskatchewan for fishing and wilderness canoeing.

5.4 Although Minnesota residents have a relatively high awareness of Saskatchewan cities such as Regina and Saskatoon, it is highly unlikely that Saskatchewan cities will become travel destinations for Minnesota pleasure travellers. Other larger metropolitan cities are located in closer proximity to the Minnesota market. Saskatchewan's promotional programs should emphasize the natural and outdoor recreational opportunities of the province and promote those activities which are a strength in Saskatchewan.

APPENDIX A
METHODOLOGY

A. THE SAMPLE

Information was required on the travel behaviour of residents of Minnesota and especially on those who travel 2,400 km. or more which is of sufficient distance to travel to Saskatchewan.

The study was concerned with trips taken by individuals 18 years of age or older, and data was collected on travel patterns of Minnesota residents for the past three years.

A disproportionate sampling procedure was designed to yield a sample of 250 completed interviews for metropolitan and rural Minnesota.

The Kish respondent selection system was used to select the proper household member. Six different versions of the Kish respondent selection system were utilized to insure randomness of sample.

To ensure representativeness of the sample, up to three dialing attempts at different times of day and on different days of the week, were made to complete an interview at a designated household. If, after three attempts, an interview could not be completed at a designated household, an alternate was substituted.

For results based on a sample of this size, with a 95% confidence level, the error is $\pm 3\%$.